



Contribution of the EMFF to the implementation of the CFP

Miguel Peña Castellot

Structural Policy and Economic Analysis
Unit, DG MARE

Expert Group EMFF

Brussels, 9 June 2015

To what extent do EMFF Operational Programmes support the CFP objectives?

The analysis in the presentation is based on formal and informal OP submissions and does not yet reflect the data in all adopted EMFF Operational Programmes, state of play: May 2015

- The answer is generally very positive.
- In general, there is a good link between the SWOT analysis, the context indicators and the strategy in OPs.
- The link is less positive between the OP strategy and the result and output indicators.
- Often, the result indicators are not ambitious enough (or are empty)
- As for the output indicators the number of projects sometimes does not appear to reflect the importance given in the strategy to some UPs

To what extent will the new EMFF programmes contribute to balance fishing capacity with available resources?

Change in the relative importance of fisheries measures EFF vs EMFF

MS	% Axis 1 EFF	% UP1 EMFF	Change?
Austria	0%	0,65%	^
Belgium	44,03%	5,52%	vvv
Bulgaria	10,00%	21,48%	^^
Cyprus	26,36%	32,55%	^
Denmark	30,20%	35,59%	^
Estonia	18,05%	19,14%	^
Hungary	0%	0%	=
Spain	38,83%	32,13%	v
Finland	8,73%	16,53%	^^
Croatia	52%	34,37%	v
Lithuania	13,80%	16,40%	^
Latvia	20,95%	21,78%	^
Malta	25,98%	37,78%	^^
The Netherlands	34,82%	35,70%	^
Sweden	25,00%	18,34%	vv
Slovenia	10,00%	12,09%	^
France	30,09%	27,01%	v
UK	28,76%	28,93%	^
Slovakia	0%	0%	=
Portugal	25,5%	26,24%	^
Romania	4,32%	7,84%	^^
Greece	37,18%	32,93%	v
Germany	4,87%	19,48%	^^
Poland	19,14%	24,51%	^
Czech Republic	0%	0%	=
Italy	38,00%	32,21%	v
Ireland	82,25%	19,98%	vvv
TOTAL	23,29%	20,71%	v

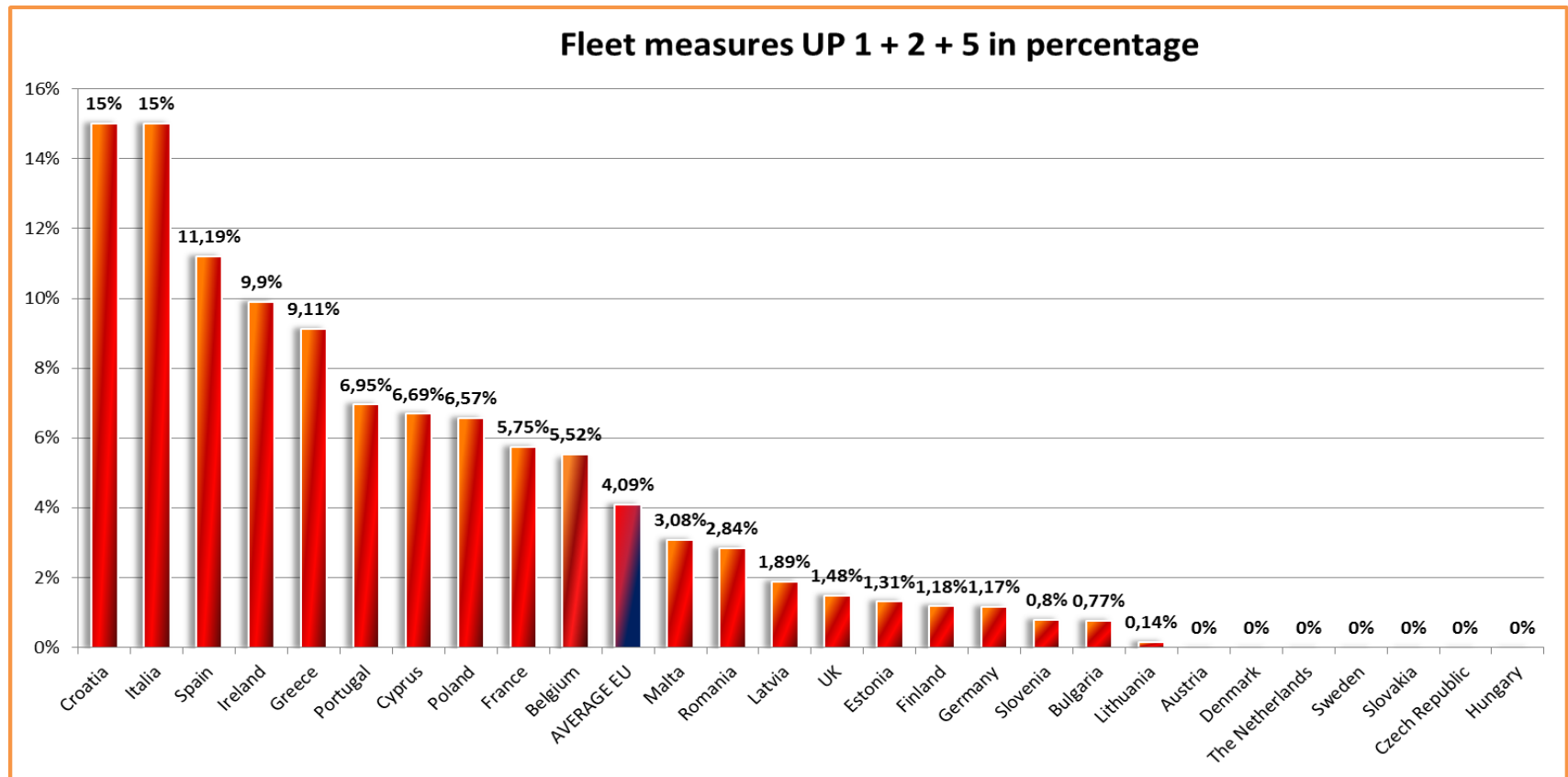
Fleet measures in the EMFF (2014-2020)

1. Temporary cessation of fishing activities (Art. 33);
 2. Permanent cessation of fishing activities (Art. 34); and
 3. Support for the replacement and modernisation of main of ancillary engines (Art. 41.2).
- **Limitations:**
 - Overall EMFF support is capped at €6 m or 15% of the EMFF support to UP1 (fisheries), UP2 (aquaculture) and UP5 (processing).
 - For permanent cessation and engine replacement, limited to certain fleet segments



European
Commission

Planned EMFF expenditure on Art 33, 34 and 41.2 over expenditure in UP 1, 2 and 5 (Adopted and Proposed OPs)



Assessment

EFF (2007-2013) €764 m - EMFF (2014-2020) €285 million (63% reduction)

- Only two MS (Croatia and Italy) have reached the maximum cap of 15%.
- Spain (11.2%) , Ireland and Greece are over 9%.
- 6 MS (including 3 coastal MS) have no plans to introduce fleet measures.
- 6 MS (out of 10+1) account for 92% of the planned expenditure in fleet measures.
- **4,09% average of EMFF support for fleet measures is quite modest .**
- Also, the relative importance of fleet measures in the EMFF has decreased dramatically compared to the EFF in expenditure terms.
 - 19% in the EMFF – UP 1 (down from 81% in the EFF – Axis 1)

Planned numbers of fleet measures operations in the EMFF OPs

MS	Scrapping operations	Temporary cessation operations	Engine replacement
Total	1.784	42.529	2.843

Comparisons with the EFF

- The most recent figures available on EFF expenditure show that until 31 May 2014 there had been:
 - 4,156 scrapping operations;
 - 61,715 temporary cessation operations; and
 - 1,065 engine replacements.
- Looking at the EMFF, the number of foreseen scrapping operations will reduce by 57.5% and that of temporary cessation by a third. The number of engines replaced increases nearly 3 times.
- The significant reduction of public supported scrapping operations could explain a significant part of the reduction of fleet measures expenditure.
- 20 MS used scrapping under the EFF. Only 11 plan to do so under the EMFF

Fleet reports & Action Plans submitted by MS

- Generally speaking, the contents and quality of the analysis in the fleet capacity reports for 2013 (and in particular for 2014) has improved very significantly;
- However, COM finds that:
 - In some cases not all fleet segments are analysed;
 - In other cases, the analysis is complete in terms of fleet segments, but there is no conclusion as to their balance/imbalance;
 - Still in other cases, action plans under Article 22.4 R1380/2013 are missing even if some fleet segments are concluded to be imbalanced.

Measures in support of the small-scale coastal fleets (SSCF)

Action Plans SSCF (Section 4.2 of the OP)

- So far 11 Action Plans SSCF have been received.
- Their main focusses are on diversification, added value & product quality (direct sales), training & social dialogue, start-up support for young fishermen, energy efficiency, engine replacement and health & safety.
- Some foresee also improving landing sites, often in relatively minor fishing harbours where SSCF fleets concentrates
- Several include actions intended to improve data collection and control.
- COM sees that in several cases, a link with CLLD strategies is made.
- Beyond the SSCF AP, there are unbalanced fleet segments in several MS (scrapping foreseen).



European
Commission

MS	Article 27 Advisory services	Article 29 Promotion of training, networking and dialogue	Art 30 Diversification and new forms of income	Art 31 Start- up support for young fishermen	Art 42 Added value, product quality and use of unwanted catches
Belgium		5	5	5	5
Bulgaria			50		42
Croatia	15		102		150
Cyprus			20		
Denmark					108
Finland		10	20	20	100
France	325	25	240	421	323
Germany	5	0	47	17	59
Greece	20	52	100	50	100
Ireland	35	205		15	110
Italia	500	450	120	20	50
Latvia					15
Lithuania	72		8		22
Malta		1	1		
Poland	42	50	320	20	280
Portugal		24	11	12	95
Romania	54		55		30
Slovenia					12
Spain	10	68		35	138
Sweden		70	15		50
The Netherlands				7	7
United Kingdom	66	27	66	36	81
Totals	1144	987	1180	658	1777

Comparison with EFF (articles 26 &27)

- Under the EFF, there were 3,055 operations under Article 26 (SSCF fishing) and close to 6,000 under article 27 (socio economic compensation).
- Together they accounted for 8,6% of EFF operations and € 78 million of EFF money.
- In terms of operations, there are less. Some comparisons can be made:
- Under the EFF, there were 272 premiums granted for acquiring a first fishing vessel by <40 year old. Now it is 3 times more;
- There were 1,363 diversification operations (15% less in EMFF); and
- Around 200 training operations (close to 5 times more under the EMFF)
- Advisory services and added value (mainly promotion of direct sales) are new.

To what extent do measures in the EMFF contribute to achieve a more sustainable use of marine biological resources and to the protection of the marine environment?



European
Commission

Projects under articles 26, 39, 38 and 40 EMFF

	Art. 26 Innovation	Art. 38 Limitation of the impact of fishing on the marine environment and adaptation of fishing to the protection of species	Art. 39 Innovation linked to the conservation of marine biological resources	Art 40. (a) collection of lost fishing gear and marine litter	Art 40. (b-g & i) Better management, construction, installation of facilities, protection of Natura 2000 sites, enhancing biodiversity and ecosystem services	Art 40. (h) schemes for the compensation of damage that catches caused by mammals and birds	Article 41.1 Energy efficiency
Belgium	5	40	5	5	5		10
Bulgaria		30	14		9		7
Croatia	20	80		15	5	80	30
Cyprus		20		2	14	300	20
Denmark	11	35	14	690			
Estonia	23	65			5		20
Finland	1	53	1	3	5	800	
France	53	396	53	568			285
Germany	15	49	14	14	65	0	42
Greece	10	4	5		14		150
Ireland	10	178	20	2	50		30
Italia	30	200	20	20	150	500	20
Latvia	10	20					
Lithuania	2	9	9	2	2	28	5
Malta			1				
Poland	16	32	8	20	11	11	
Portugal	16	22		6	8	5	12
Romania	2	15					
Spain	20	160	20	1	42		57
Sweden	2	126	30	19	21		
The Netherlands	16	20	40				
United Kingdom	26	85	113	5	81		331
Totals	288	1639	367	1372	494	1724	1019

- The total number of projects is 7.7% of the total number of operations. 10.4% of UP1 operations.
- **Innovation in the EFF**
 - EFF support for innovation has been mixed : 592 pilot operations (0.49% of the EFF total).
 - Very expensive projects (close to €0,4 m each) in the EFF
 - Very low leverage effect (€1 EFF =€1.3 national, most of it public national money) in the EFF
- **Innovation in the EMFF**
 - 645 (A26 + A39) planned projects limited to the catching sector (56% in environmental innovation). They amount to 0,71% of the EMFF total.
 - Significant number of additional innovation projects in aquaculture (550) and processing.
 - Progress, but less than expected.

Conclusions

- Good consistency between OP contents and the CFP objectives. Less so between strategy and result / output indicators;
- Very significant reduction of expenditure in fleet measures; even if the use of engine replacement increases a lot;
- Start-up support increases also very significantly.
- MS have recognised the importance of training, advisory services and quality increases for SSCF
- Significant progress in reduction of impact of fisheries and contribution to environmental sustainability; but
- Even if there is progress in innovation, it is less than expected.

Thanks for your attention!

